

Clackamas Investment Strategy
Ready for the New Economy
Development Services Building, Room 118
February 29, 2012 9:30am to 12:45pm

Clackamas County is at a pivot point. The economy is changing. The traditional sources of funds we have used to build our roads, streets and bridges are shrinking. Many citizens, feeling economic stress themselves, are taking a hard look at what we should and should not build.

On the other hand, it is clear that the county will continue to grow. And to grow, we need infrastructure to move people and goods. We need to provide opportunities for development, and to ease the path for entrepreneurs and companies who want to invest and put people to work.

To move that discussion forward, Clackamas County is working toward a Clackamas Investment Strategy to guide the county in targeting smart investments, not only of county funds, but of county staff and political resources.

To help form the strategy, the Board of County Commissioners is having a series of planning meetings, focusing on different features of the county's economic landscape.

Planning Meeting Agenda
February 29th

- | | |
|----------------------|---|
| 9:30 – 10:00 | Long Term Investment in the Transportation System
✓Karen Buehrig, Clackamas County
✓Mike Bezner, Engineering Division Manager
✓Chips Janger, Chair of the TSP Public Advisory Committee |
| 10:00—10:30 | Discussion of Vision, Goals and Objectives with BCC |
| 10:30 – 11:00 | The Contribution of Arts and Culture to The County Economy
✓Cheryl Snow |
| 11:00 – 11:15 | The Economic Role of Tourism in Clackamas County
✓Danielle Cowan |
| 11:15—11:45 | Panel Discussion
✓Peter Watts, Jordan Ramis and TDC Chair
✓Frank Casarez, General Manager, Resort at the Mountain
✓Sam Drevo, eNRGKayaking-Oregon City |
| 11:45 –12:45 | Lunch and Discussion |





CLACKAMAS COUNTY Update TRANSPORTATION SYSTEM PLAN

Clackamas Investment Strategy

Investing in the Transportation System

TSP Project Update

BCC Planning Session

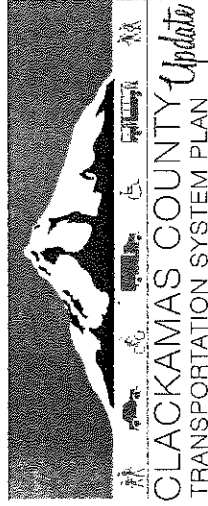
February 29, 2012



Investing in the Transportation System

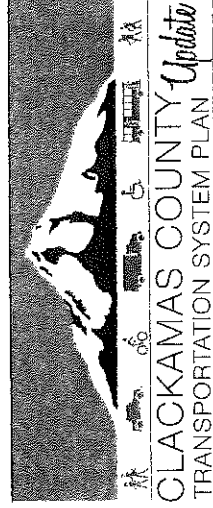
The Transportation Systems Plan (TSP)

- Considers the needs for the next 20 years
- Develops a list of high/medium/low priority projects
- Creates the Capital Improvement Plan (CIP)

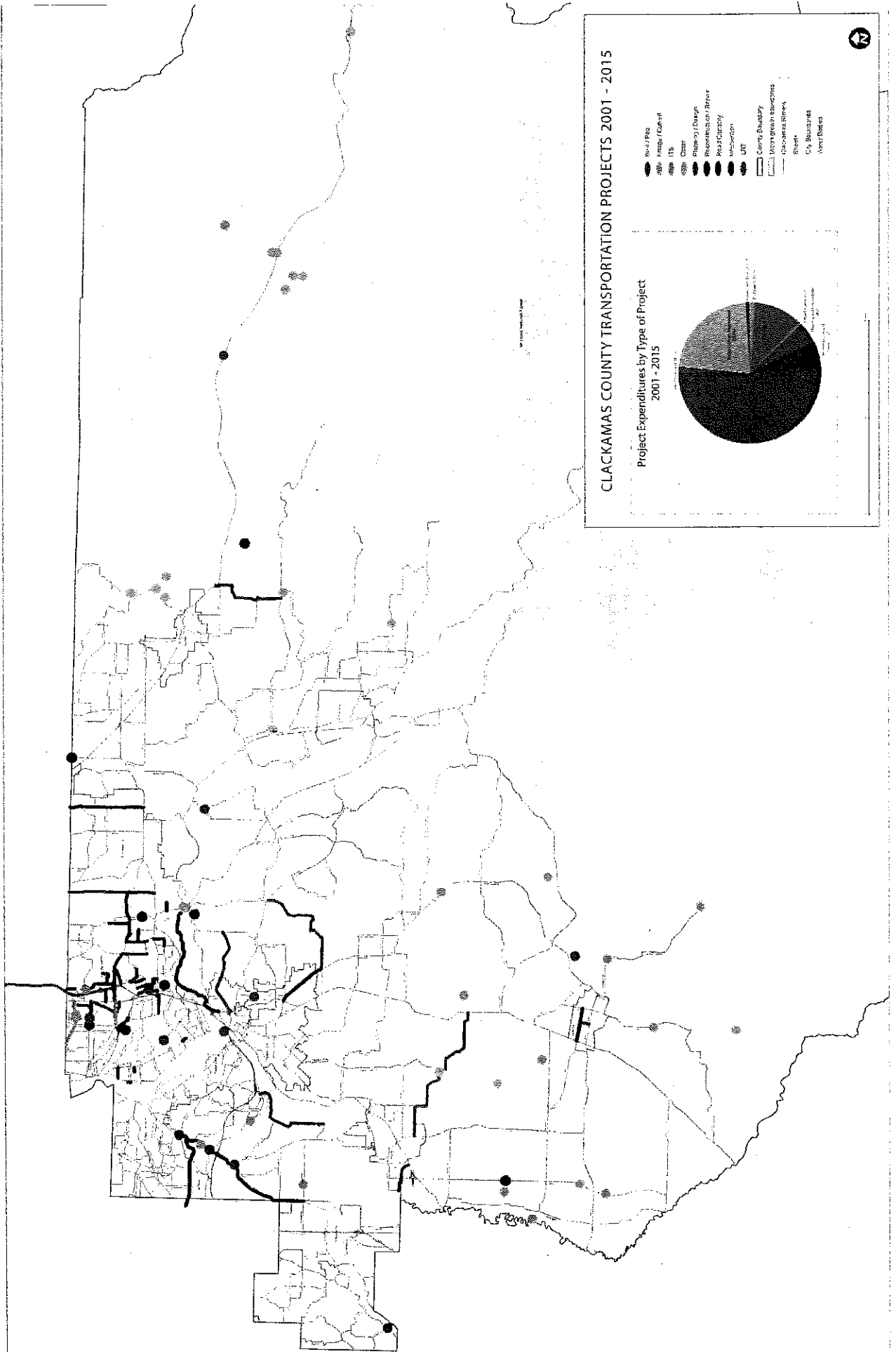


Historical Perspective

- Current CIP list completed in 2001
- Includes projects identified in both the Urban TSP and the Rural TSP
- Snapshot of the projects that have been completed since 2001



2001 TSP: Completed Projects



2001 TSP

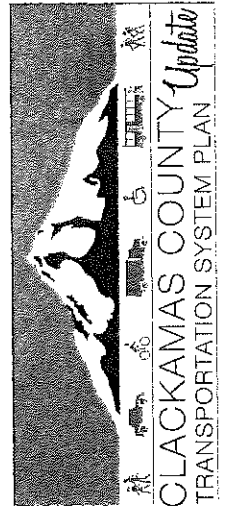
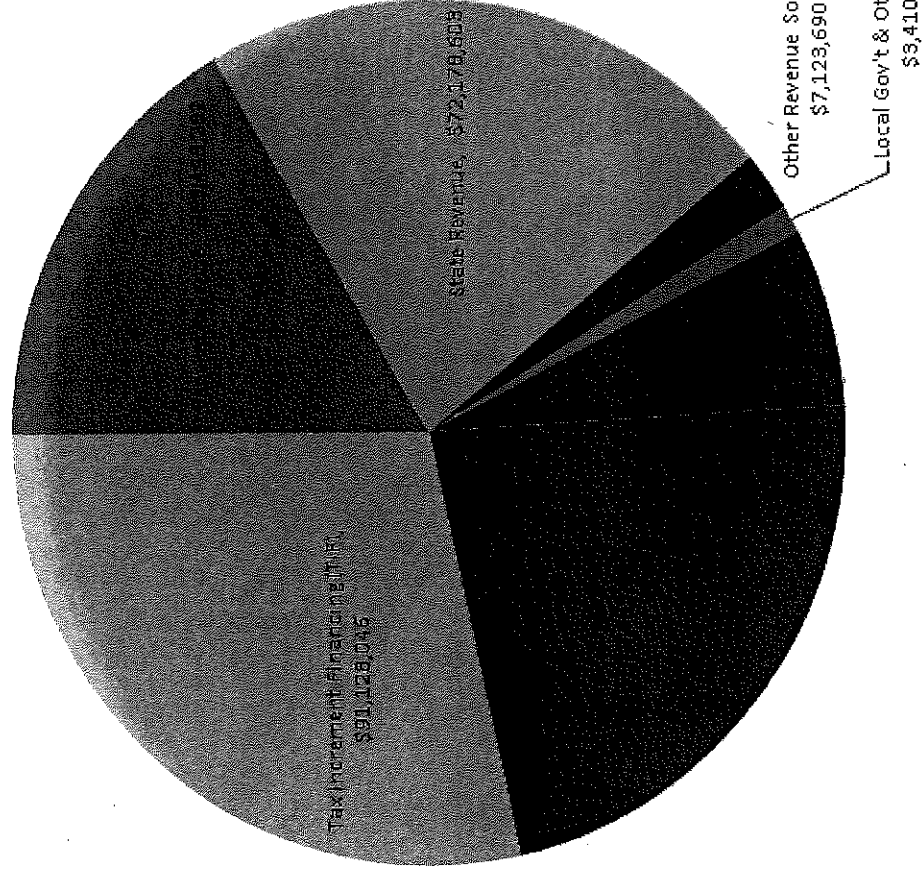
Transportation Project Funding Sources in Unincorporated Clackamas County 2001-2015

Total: \$321 million*

- 6.6% Road fund
- 22.5% SDCs
- 28.4% TIF
- 16.7% Federal revenue
- 22.5% State revenue
- 2.2% Other revenue sources
- 1.1% Local gov't & other agencies

**Includes projects completed, underway and planned*

All projects in unincorporated Clackamas County



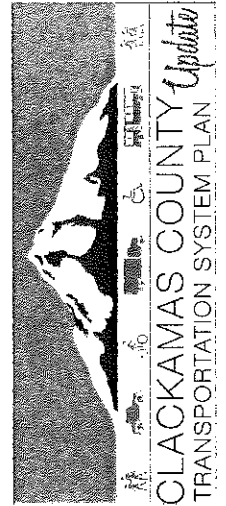
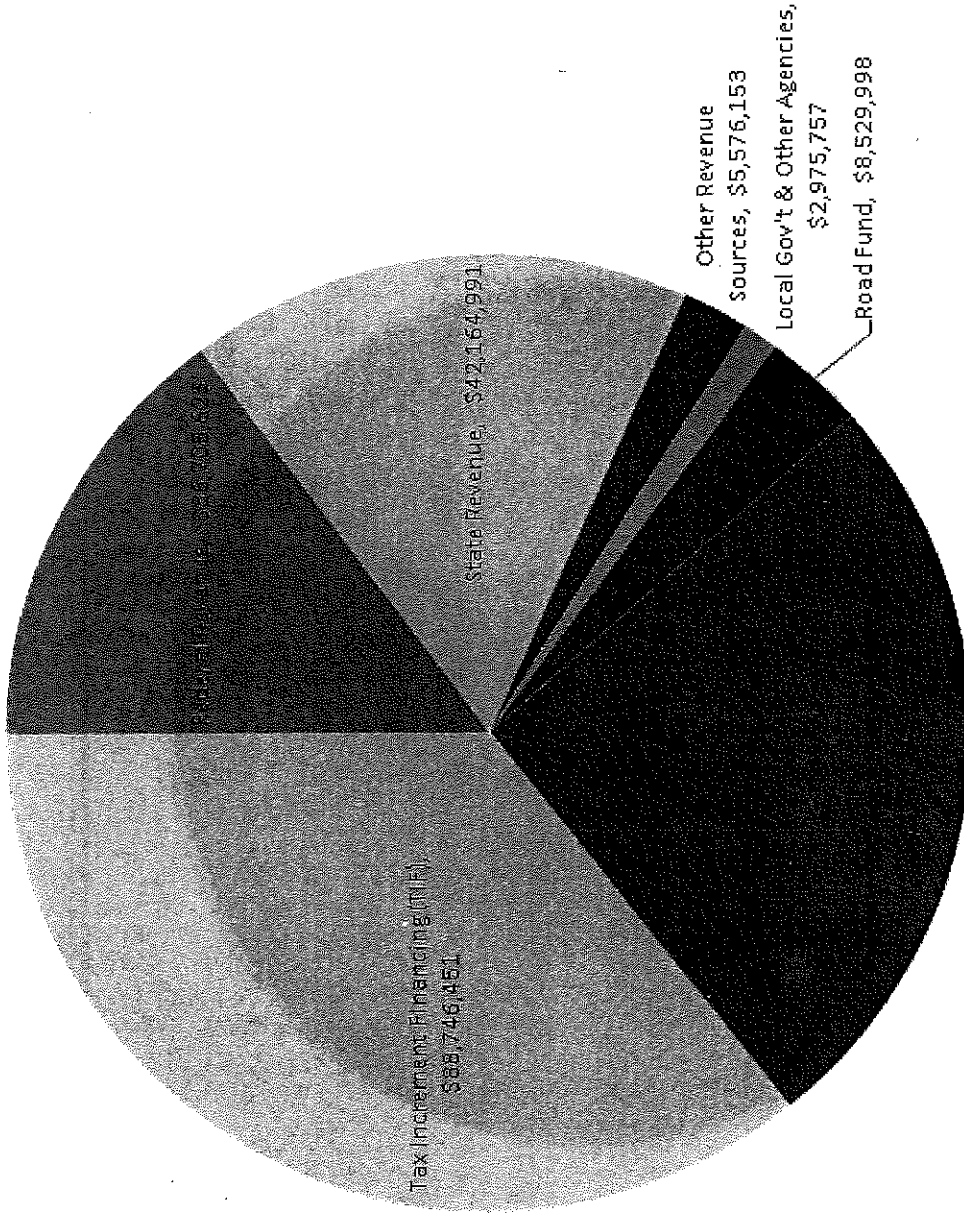
2001 TSP

Total: \$250 million*

- 3.4% Road Fund
- 25.6% SDCs
- 35.7% TIF
- 14.8% Federal revenue
- 17.0% State revenue
- 2.2% Other revenue sources
- 1.2% Local gov't & other agencies

**Includes projects completed, underway and planned*

All projects in unincorporated Clackamas County



Projects Inside Metro UGB 2001-2015

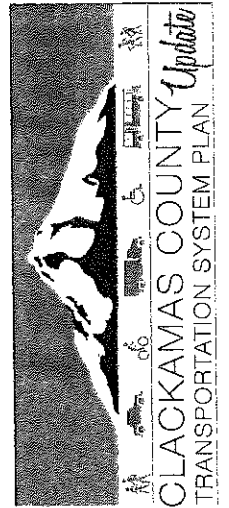
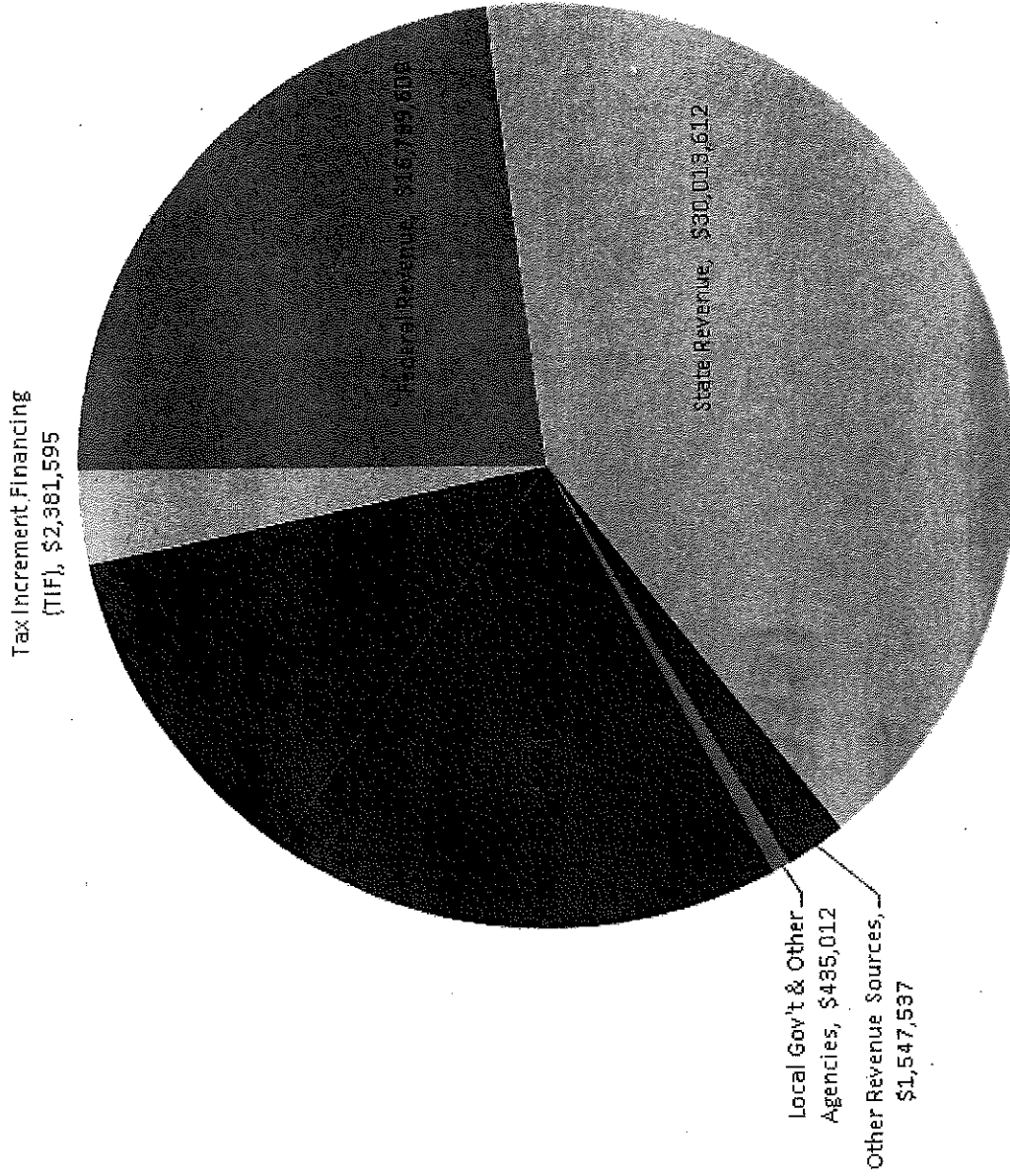
2001 TSP

Total: \$72.6 million*

- 17.6% Road fund
- 11.9% SDCs
- 3.3% TIF
- 23.1% Federal revenue
- 41.3% State revenue
- 2.1% Other revenue sources
- 0.6% Local gov't & other agencies

**Includes projects completed, underway and planned*

All projects in unincorporated Clackamas County

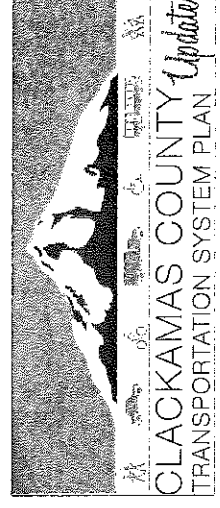


Projects Outside Metro UGB 2001-2015

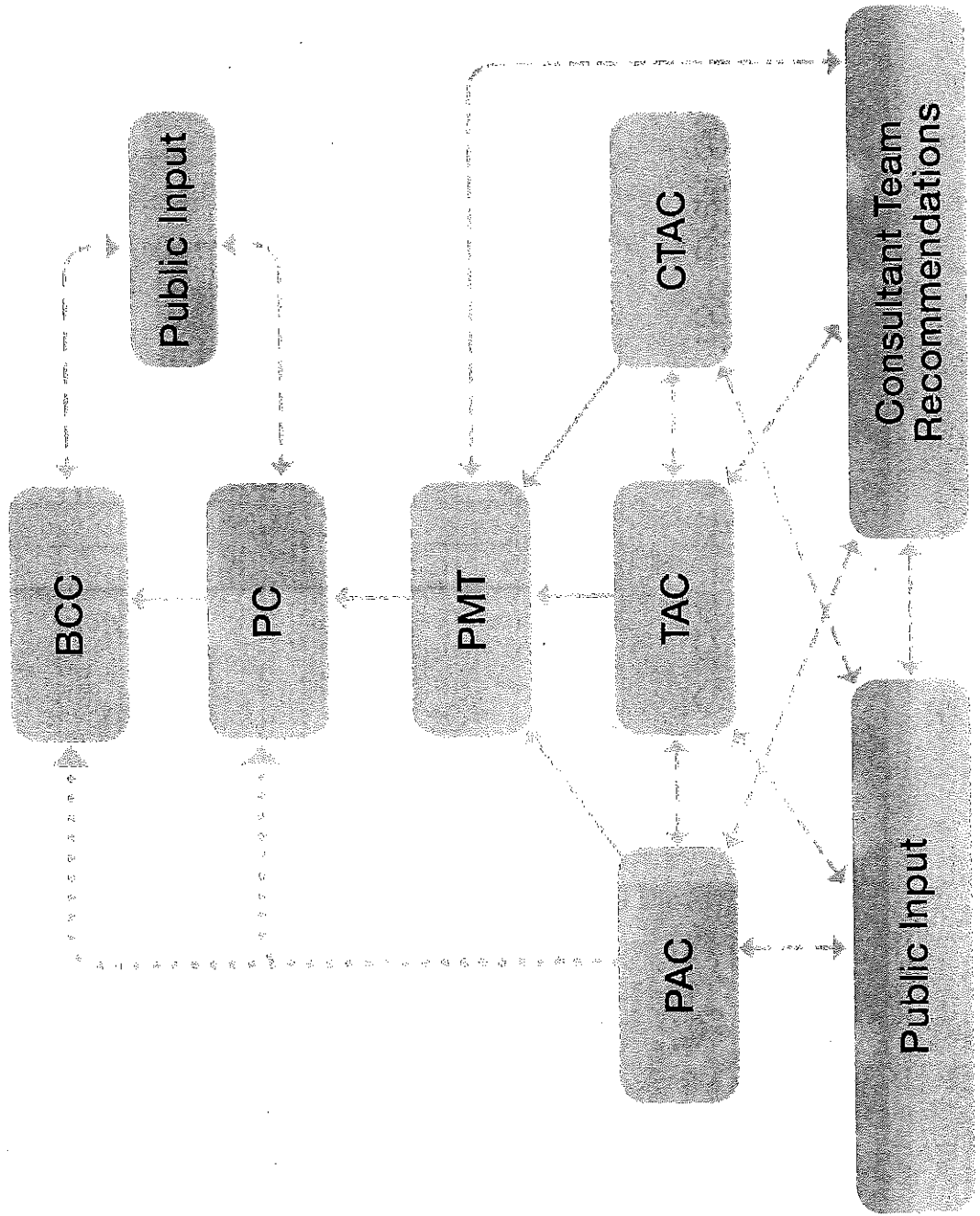
TSP Update Process: Components



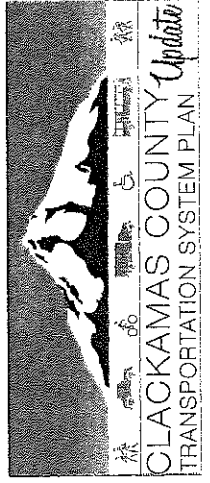
- All transportation modes
- For 20 years (through 2035)
- Projects
- Policies
- Programs
- Pilot projects
- Future studies



TSP Update Process: Flow Chart



- BCC – Board of County Commissioners
- PC – Planning Commission
- PMT – Project Management Team
- PAC – Public Advisory Committee
- TAC – Technical Advisory Committee
- CTAC – Clackamas Transportation Advisory Committee





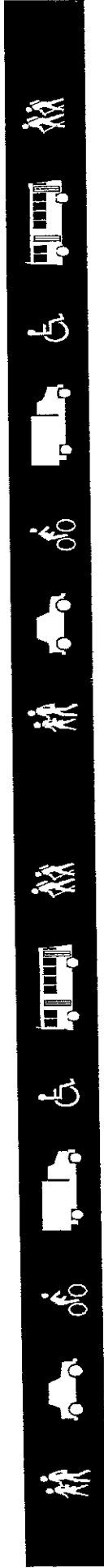
Clackamas County TSP Draft Schedule



Month	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG		
1. Project Management and Coordination: Public Involvement Program Countywide Public Meetings Regional Workshops Public Advisory Committee (PAC) Meetings Technical Advisory Committee (TAC) Meetings CTAC Meetings Board of County Commissioners (BOCC) Study Sessions Public Hearings			★																								
2. Review Existing Plans and Policies Geographic Area Determination Review and Finalize TSP Vision, Goals and Objectives Research Evaluation Methods and Develop Outcome-Based Evaluation Criteria Transportation Data Collection Travel Model and Forecast - 2010 and 2035 Households and employment Transportation system - Existing Conditions and Deficiencies Analysis Future Base Conditions and Deficiencies Analysis - 2035 Evaluate Existing TSP Projects Preferred TSP Project List Draft TSP Technical Document Project Cost Estimates, Funding Options & Financially Prioritized Project List Plan, Policy and Ordinance Language TSP Adoption Process																											

★ = Countywide Public Meeting * = Regional Workshop ○ = PAC Meeting ◆ = TAC Meeting ▲ = CTAC Meeting ● = BOCC Study Session ■ = Public Hearing

Extensive Public Involvement



- Public meetings
 - Regional workshops
 - Virtual open houses
- Stakeholder outreach
- Website and social media
- Media communication
- Newsletters and flyers
- Email outreach



HOME INFORMATION LATEST NEWS FEEDBACK SUBSCRIBE OPT-OUT CONTACT

Clackamas County Transportation System Plan

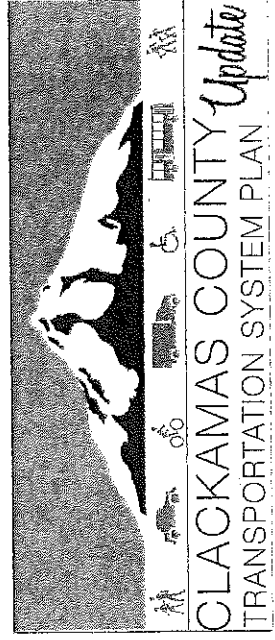


The Future of Travel in Clackamas County

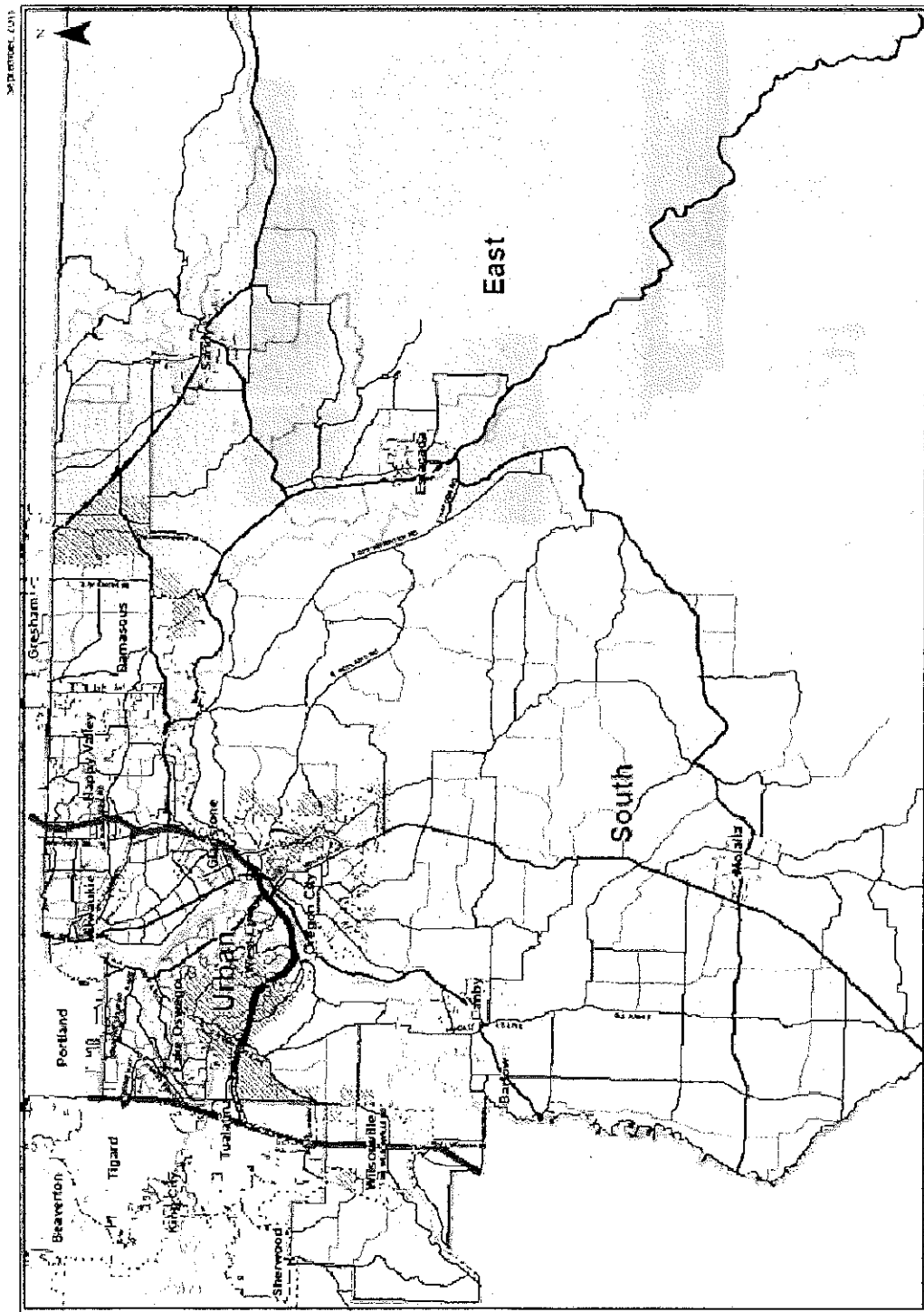
Planning our way forward - planning for the future
What: Clackamas County is updating its Transportation System Plan (TSP) for unincorporated areas in the County. The two-year process covers all forms of transportation, including roads, transit, walking, bicycling, rail and air. It is tailored to Clackamas County's diverse geographic and planned land uses. The result will be a plan to keep people and products moving safely and smoothly in and through Clackamas County for decades to come.

Why: As Oregon cities and counties are required to have a TSP and update it every 10 years. Our County is changing dramatically and its population. Through this effort, and only your help, we will identify the best ways to build upon our existing system and make smart future investments that provide choices for getting around.

When: The planning process is going to take about two years - from 1/17/2011 through (fall 2013). See a copy of the current TSP here: [http://www.clackamascounty.org/transportation](#)



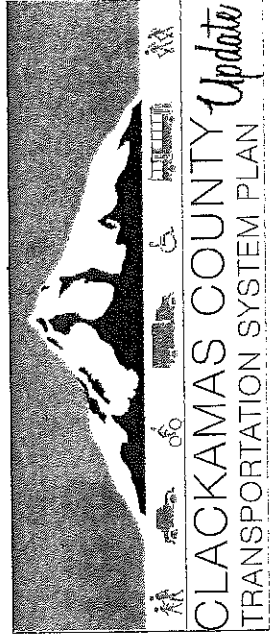
Regional Outreach



Public Advisory Committee



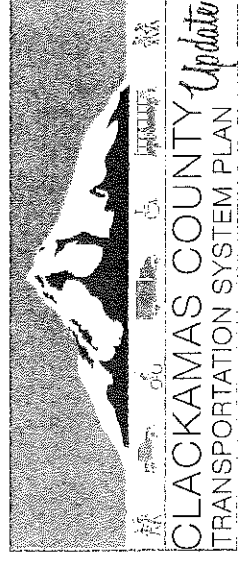
- 22 citizens from throughout the County
- Review, oversight and recommendations
 - Vision, Goals, Objectives
 - Public outreach
 - Measures and evaluation criteria
 - Existing and future conditions
 - Projects and preferred plan



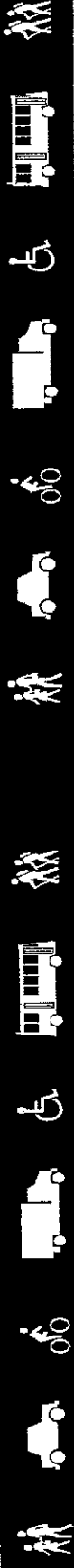
Technical Advisory Committee



- 24 technical experts
 - Partner agencies (e.g., ODOT, TriMet, Metro, Forest Service)
 - Business community
 - Areas of interest (e.g., social services, public safety, public health, public involvement)
 - Transportation (e.g., traffic safety, planning, rail, modeling)
- Review, oversight and recommendations
 - Vision, goals, objectives
 - Measures and evaluation criteria
 - Existing and future conditions
 - Alternatives
 - Projects and preferred plan

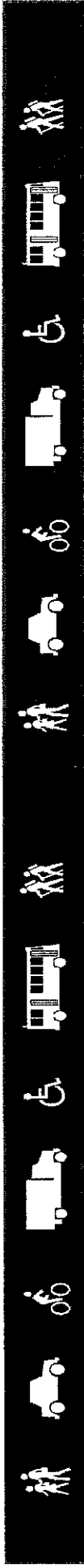


Vision and Goals



- Significant step in the process
- PAC has worked diligently at reviewing and revising the Vision and Goals that were drafted during “Phase 0”
- Does the BCC accept the Vision and Goals?

Vision



Draft

Building on the foundation of our existing assets, we envision a transportation system that provides mobility, accessibility and connectivity for people, goods and services; is tailored to our diverse geographies; and supports and sustains planned land uses.

PAC Final

Building on the foundation of our existing assets, we envision a well-maintained and designed transportation system that provides safety, flexibility, mobility, accessibility and connectivity for people, goods and services; is tailored to our diverse geographies, and supports and sustains future needs and planned land use plans.

Goals



Draft

- **Sustainable:** Create a transportation system that mutually benefits the environment, the economy and the community.
- **Local Business and Jobs:** Plan the transportation system to support a prosperous and adaptable economy and further the economic well-being of the County and its residents.
- **Livable and Local:** Customize transportation solutions to suit the local community.
- **Safety and Health:** Promote a transportation system that maintains and improves individual and community health, safety and security.
- **Equity:** Provide an equitable transportation system.
- **Fiscally Responsible:** Maintain a fiscally responsible approach to protect and improve the existing transportation system and implement a cost-effective system to meet future needs.

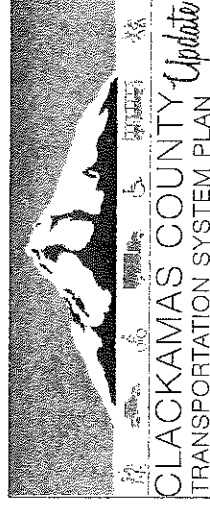
PAC Final

- **Sustainable:** Provide create a transportation system that optimizes mutually benefits to the environment, the economy and the community.
- **Local Business and Jobs:** Plan the transportation system to create support a prosperous and adaptable economy and further the economic well-being of the County and its residents businesses and residents of the county.
- **Livable and Local:** Tailor Customize transportation solutions to suit the diversity of local communities.
- **Safety and Health:** Promote a transportation system that maintains and or improves individual and community our safety, health, and security.
- **Equity:** Provide an equitable transportation system.
- **Fiscally Responsible:** Promote maintain a fiscally responsible approach to protect and improve the existing transportation system and implement a cost-effective system to meet future needs.

Next Steps



- Complete measures and evaluation criteria
- Identify existing conditions
- Identify projected conditions
- Develop alternatives for projects and plan
- Identify preferred projects and plan





TRANSPORTATION SYSTEM PLAN VISION, GOALS AND OBJECTIVES

Date: February 27, 2012 Project #: 11732

To: Project Management Team

CC: Technical Advisory Committee, Public Advisory Committee

From: Susan L. Wright, P.E.; Marc A. Butorac, P.E., P.T.O.E.; Kelly M. Laustsen; and Erin M. Ferguson, P.E.

Project: Clackamas County Transportation System Plan Update

Subject: Technical Memorandum 5.1 Draft Transportation System Plan Vision, Goals and Objectives

This memorandum presents the vision, goals and objectives statements for the Clackamas County Transportation System Plan based on consensus reached at PAC Meeting #3 on February 7, 2012. The objectives presented below also reflect input provided during work sessions with the two technical sub-committees helping to draft measures and evaluation criteria for each objective. In the process of combining the input, the consultant team realized there were a number of objectives stated in a similar manner that overlapped across several of the goals. A common version of each of these objectives was developed such that they would be applied consistently across the goals.

VISION

Building on the foundation of our existing assets, we envision a well-maintained and designed transportation system that provides safety, flexibility, mobility, accessibility and connectivity for people, goods and services; is tailored to our diverse geographies; and supports future needs and land use plans.

GOALS AND OBJECTIVES

Goals – The desired outcomes or other more refined expressions of the vision.

Objectives – More refined and focused descriptions of goal statements, describing how a goal can be accomplished.

Goal 1: Sustainable

Provide a transportation system that optimizes benefits to the environment, the economy and the community.

Objective 1.1: Reduce energy consumption associated with transportation:

1.1.1 Identify, maintain, and improve sidewalks, bicycle lanes, multi-use trails, and roadways.

1.1.2 Invest in and encourage public transit and connections to transit stops.

1.1.3 Encourage and support rideshare programs, car-sharing programs, transit pass programs, telecommuting, and other transportation demand management strategies.

1.1.4 Encourage the use of alternative-fuel vehicles and more fuel efficient vehicles.

Objective 1.2: Improve air quality by reducing transportation related emissions.

Objective 1.3: Minimize impacts of the transportation system on streams and water quality.

Objective 1.4: Promote a resilient transportation system that allows people to adapt to changes in their lives and in their surroundings. (Same as Objective 3.8)

Objective 1.5: Stabilize existing sources of transportation revenue and identify stable, diverse, long-term sources of funding. (Same as Objective 6.3)

Objective 1.6: Support motorized and non-motorized transportation projects that use public resources cost-effectively. (Same as Objective 6.2)

Objective 1.7: Fix and maintain the current roadways before adding new roads. (Same as Objective 6.1)

Goal 2: Local Businesses and Jobs

Plan the transportation system to create a prosperous and adaptable economy and further the economic well-being of businesses and residents of the county.

Objective 2.1: Prioritize transportation improvements that help people get to work and help businesses thrive.

Objective 2.2: Promote efficient movement of people, materials and goods.

Objective 2.3: Identify, maintain, and improve sidewalks, bicycle lanes, multi-use trails, and roadways. (Same as Objective 1.1.1)

Objective 2.4: Invest in and encourage public transit and connections to transit stops. (Same as Objective 1.1.2)

Objective 2.5: Encourage and support rideshare programs, car-sharing programs, transit pass programs, telecommuting, and other transportation demand management strategies. (Same as Objective 1.1.3)

Objective 2.6: Improve freight movement.

Goal 3: Livable and Local

Tailor transportation solutions to suit the diversity of local communities.

Objective 3.1: Identify, maintain, and improve sidewalks, bicycle lanes, multi-use trails, and roadways. (Same as Objective 1.1.1)

Objective 3.2: Improve Safe Routes to School planning.

Objective 3.3: Invest in and encourage public transit and connections to transit stops. (Same as Objective 1.1.2)

Objective 3.4: Encourage and support rideshare program, car-sharing program, transit pass programs, telecommuting, and other transportation demand management strategies. (Same as Objective 1.1.3)

Objective 3.5: Facilitate access to daily needs and services. (Same as Objective 5.6)

Objective 3.6: Prioritize transportation improvement projects that help people get to work and help businesses thrive. (Same as Objective 2.1)

Objective 3.7: Plan and design roadways so people can drive, walk, bike or take transit comfortably and include design elements that make the community a better place to be.

Objective 3.8: Promote a resilient transportation system that allows people to adapt to changes in their lives and in their surroundings. (Same as Objective 1.4)

Objective 3.9: Maintain and enhance connections to parks, recreational areas and public lands.

Objective 3.10: Prioritize resources to address transportation needs of transportation disadvantaged populations within the County. (Same as Objective 5.4)

Objective 3.11: Create project outreach activities and decision-making processes that provide meaningful opportunities for all residents to influence decision-making. (Same as Objective 5.5)

Goal 4: Safety and Health

Promote a transportation system that maintains or improves our safety, health, and security.

Objective 4.1: Reduce the number and severity of vehicle-vehicle, vehicle-bicycle, and vehicle-pedestrian crashes. Increase safety culture by integrating engineering, education, enforcement, emergency services and evaluation activities.

Objective 4.2: Provide a system that supports fire fighters, ambulances, police and other emergency response services.

Objective 4.3: Identify, maintain, and improve sidewalks, bicycle lanes, multi-use trails, and roadways. (Same as Objective 1.1.1)

Objective 4.4: Invest in and encourage public transit and connections to transit stops. (Same as Objective 1.1.2)

Objective 4.5: Improve air quality by reducing transportation-related air emissions including reducing greenhouse gas emissions to target levels. (Same as objective 1.2)

Objective 4.6: Reduce exposure to transportation related air emissions.

Objective 4.7: Encourage the use of alternative-fuel vehicles and more fuel efficient vehicles. (Same as Objective 1.1.4)

Objective 4.8: Maintain and enhance connections to parks, recreational areas and public lands. (Same as Objective 3.9)

Objective 4.9: Prioritize resources to address transportation needs of transportation disadvantaged populations within the County. (Same as Objective 5.4)

Objective 4.10: Facilitate access to daily needs and services. (Same as Objective 3.5)

Goal 5: Equity

Provide an equitable transportation system.

Objective 5.1: Identify, maintain, and improve sidewalks, bicycle lanes, multi-use trails, and roadways. (Same as Objective 1.1.1)

Objective 5.2: Invest in and encourage public transit and connections to transit stops. (Same as Objective 1.1.2)

Objective 5.3: Encourage and support rideshare program, car-sharing program, transit pass programs, telecommuting, and other transportation demand management strategies. (Same as Objective 1.1.3)

Objective 5.4: Prioritize resources to address transportation needs of transportation disadvantaged populations within the County.

Objective 5.5: Create project outreach activities and decision-making processes that provide meaningful opportunities for all residents to influence decision-making.

Objective 5.6: Facilitate access to daily needs and services. (Same as Objective 3.5)

Objective 5.7: Prioritize transportation improvement projects that help people get to work and help businesses thrive. (Same as Objective 2.1)

Objective 5.8: Provide opportunities for low-income, minority workers and business owners to obtain jobs and contracts created by transportation investments.

Goal 6: Fiscally Responsible

Promote a fiscally responsible approach to protect and improve the existing transportation system and implement a cost-effective system to meet future needs.

Objective 6.1: Fix and maintain the current roadways before adding new roads.

Objective 6.2: Support transportation projects that use public resources cost effectively and efficiently.

Objective 6.3: Stabilize existing sources of transportation revenue and identify stable, diverse, long-term sources of funding.

Objective 6.4: Identify and protect right-of-way for future transportation facilities and services.

Objective 6.5: Prioritize projects, programs, policies that balance safety, reducing traffic congestion and providing travel options.

Arts & Culture Contributions to the County Economy

Presented by:



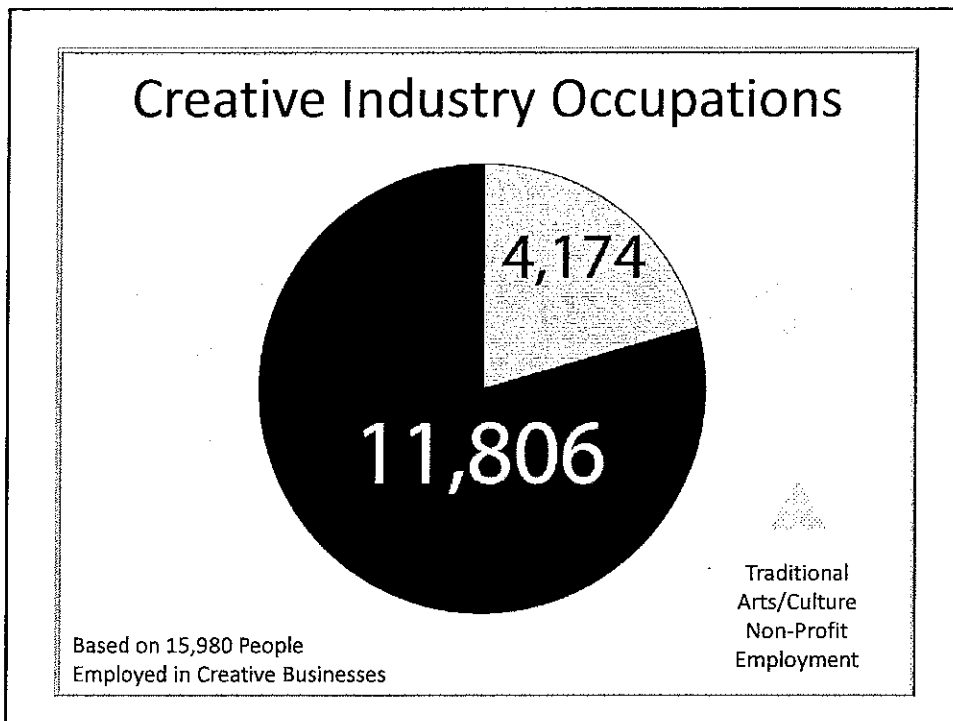
Keeping *Art* Central to Life in Clackamas County



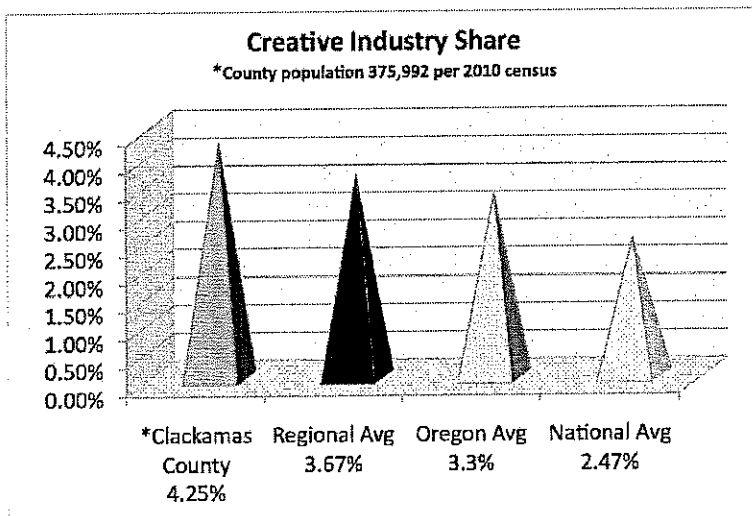
1385
Creative
Businesses



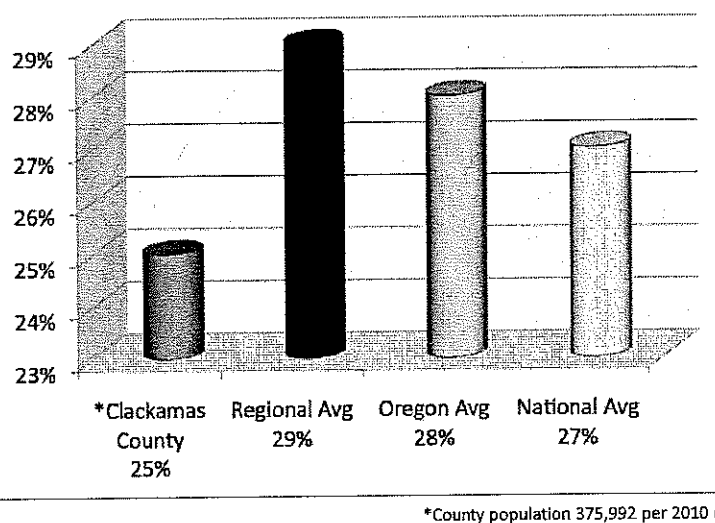
15,980
Employed
People

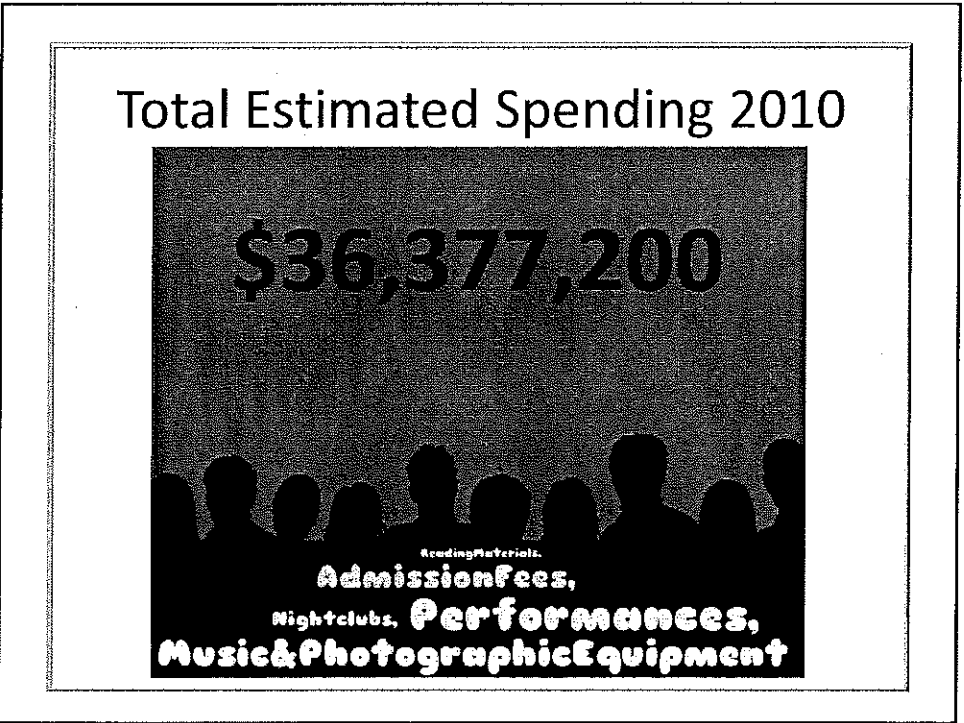
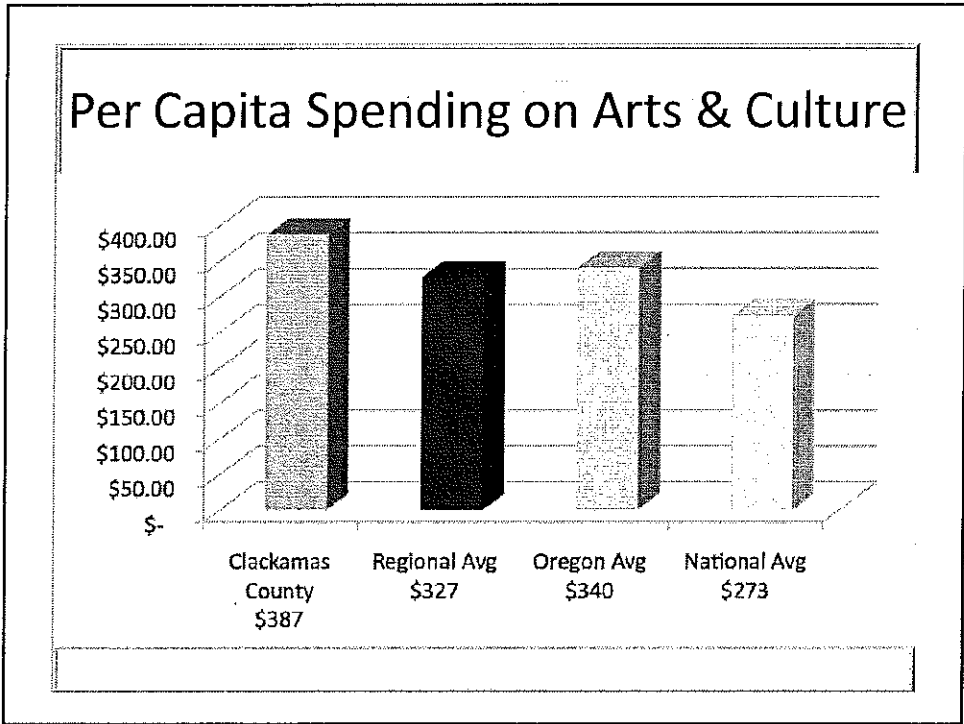


Creative Industry Occupations

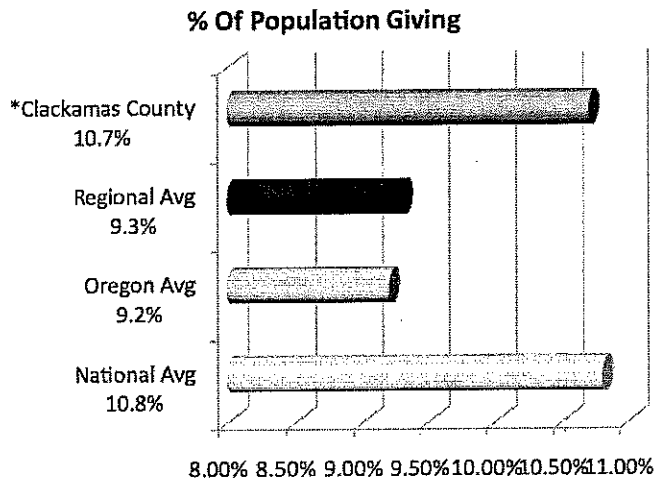


Participation in Arts & Culture





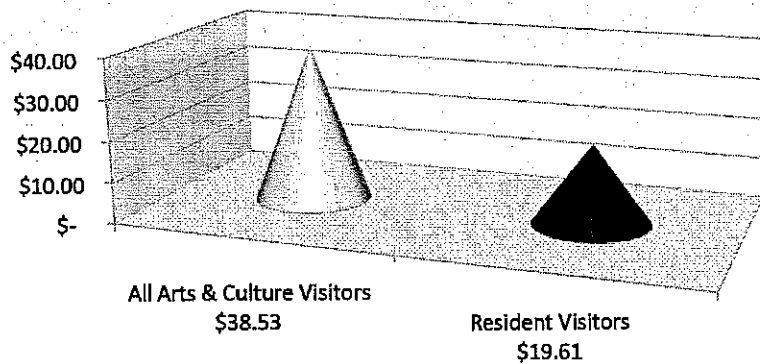
Donations to Arts & Culture



*County population 375,992 per 2010 census

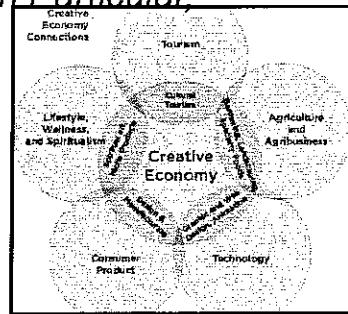
Cultural Tourism

**Spending Per Person / Day
Above Admission Fees**



21st Century Workforce

...”creativity is among the top applied skills sought by employers -- 72% of business leaders nationwide say creativity is of high importance when hiring. In Particular, music and creative writing experience provide the critical thinking skill-sets needed by knowledge-industry employers.”



On My Own

“This group has been a great benefit for my daughter. It gave her courage to talk to other kids like her who have demons to face and nobody to turn to... These kids need this.”

– Trena A.

“Participating in the Arts Alliance program really helped me. It was a sober and fun activity that opened my eyes to things that I really enjoy doing... This experience taught me how to read between the lines and how to express emotion on paper or words without anger or yelling. I am so grateful for this chance and really hope I can participate in this project again”
- Tricia S. ~ Age 17



Data Sources

- Local Arts Index
- Oregon Creative Vitality Index
- Americans for the Arts
- US Census



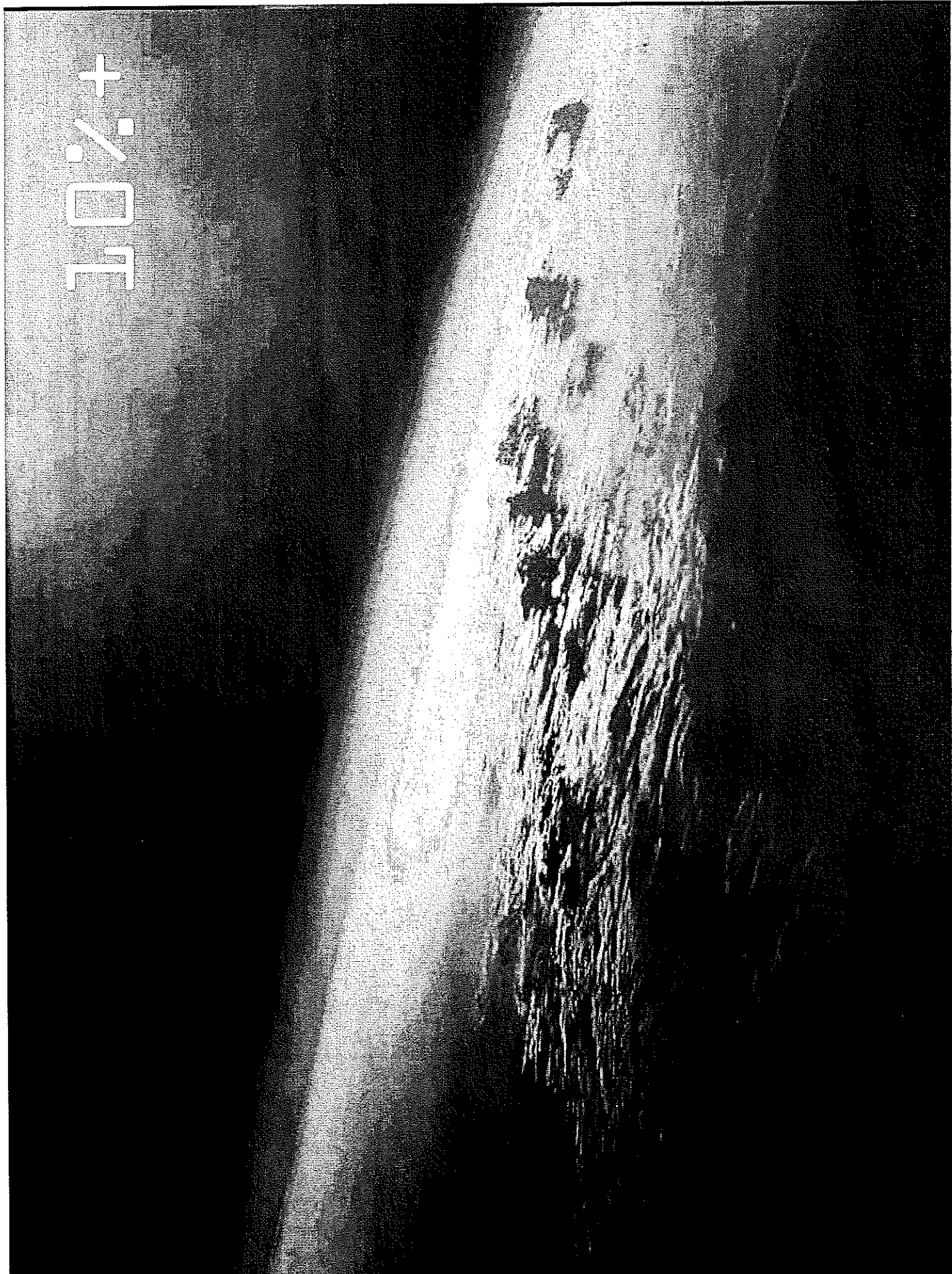
Thank You!



Clackamas County Arts Alliance

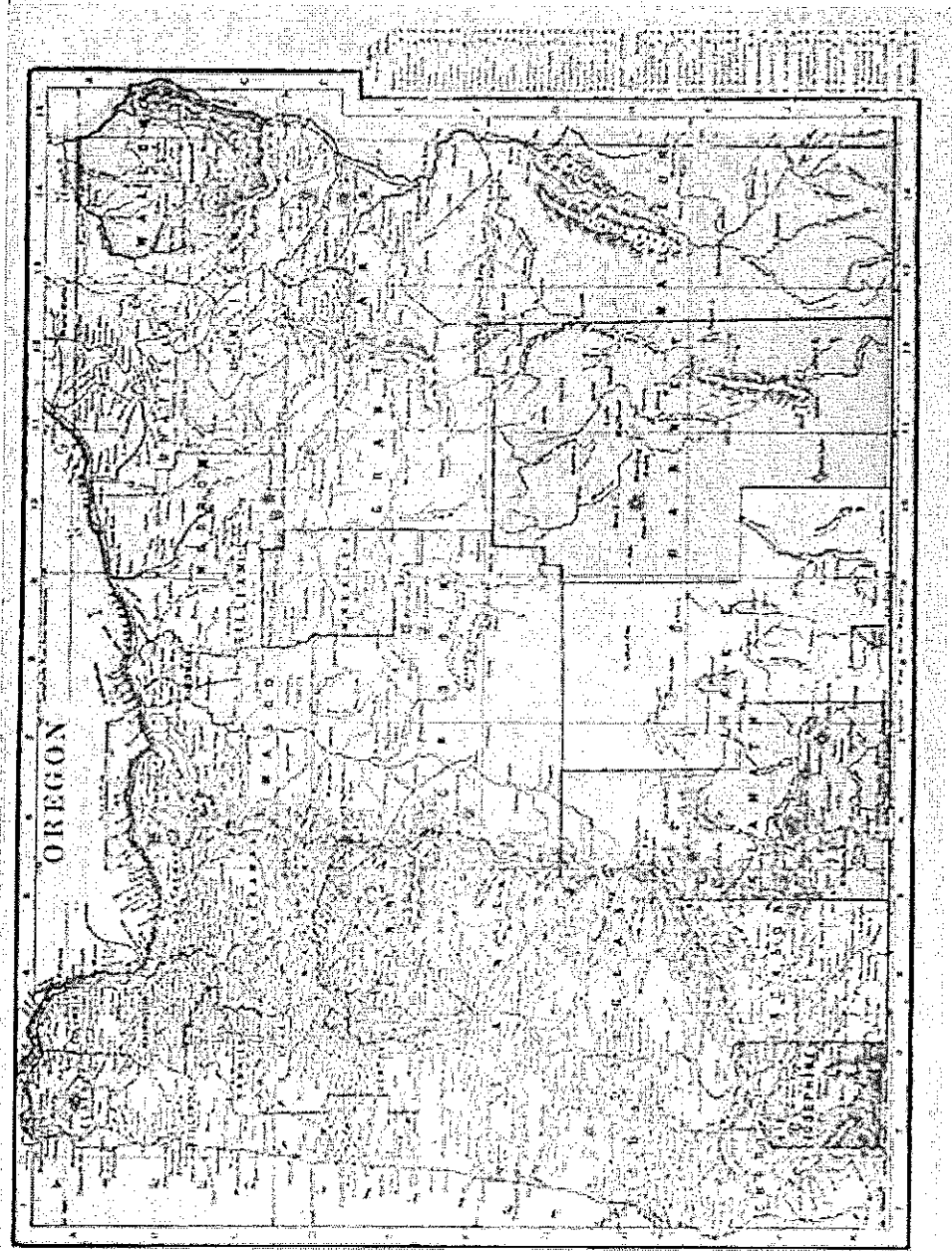
Keeping *Art* Central to Life in Clackamas County

10%+





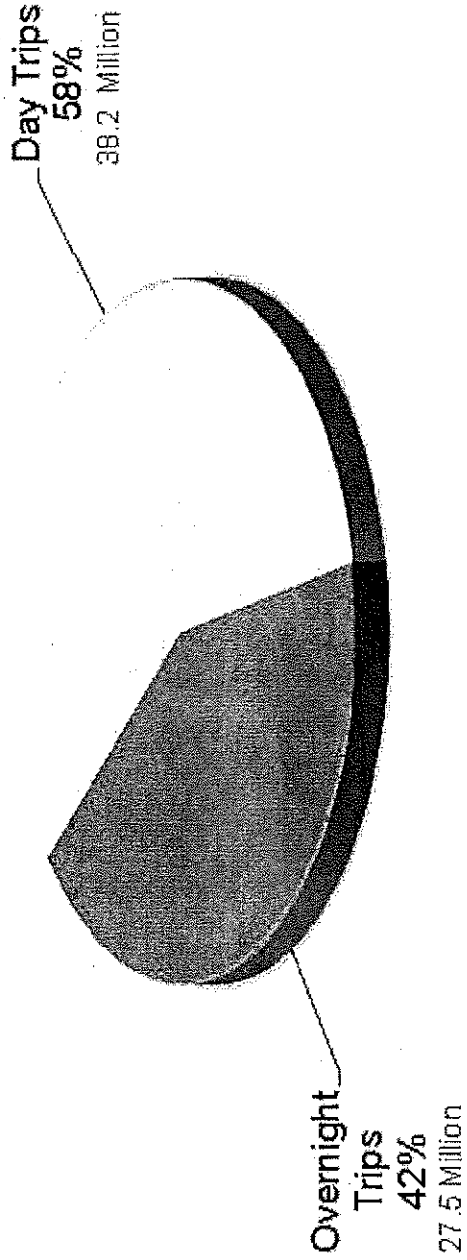
How does this translate in Oregon?



Total Size of Oregon's Travel Market



Total Trips* = 65.7 Million



*Total volume includes both adults and children



Why Tourism Matters To Oregon

2010

- **\$8.1 billion in direct travel spending (+5.2%)**
- **\$2.0 billion in travel generated earnings (0%)**
- **\$313 million in state and local taxes (+3.3%)**
- **GDP of the travel industry = \$3.1 billion**
- **Tourism = still one of Oregon's top export-oriented industries**



How does this translate in Oregon?

- 88,000 Oregonians directly employed (2010)
- Direct: restaurants, hotels, attractions, guide & outfitter businesses, tour operators, visitor information centers, convention and visitor bureaus
- 39,600 jobs supported indirectly (2010)
- Indirect: gas stations, charter boats, wineries, taxis, shopping centers, printers, art galleries and more...

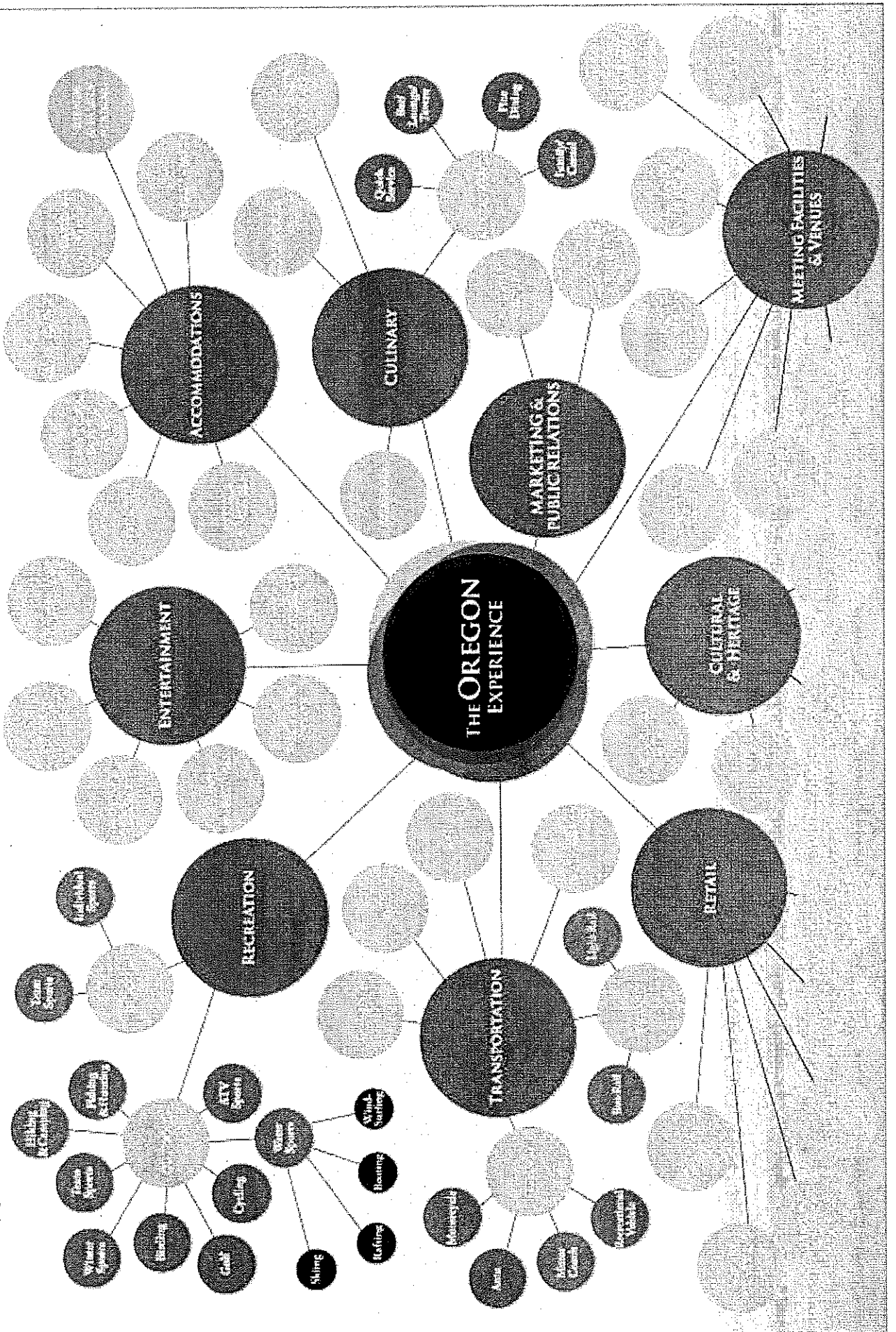


Oregon Visitor Consumer Behavior Study

- 85% of Oregon visitors said they were Very or Extremely satisfied with their trip
- 43% said they are More or Much More Likely to purchase Oregon products than before their trip
- 31% have purchased Oregon products “several times” since visiting (wine, microbrews, artisan foods...)
- 42% said that introducing their family/friends to Oregon’s local products would greatly influence their decision to visit in the future

TOURISM & HOSPITALITY INDUSTRY CLUSTER MAP

The Industry Cluster map is designed to be a visual narrative of the relationship of the industry or categories that make up an industry. It immediately demonstrates the strategic interdependence that defines an industry. The map can be developed on multiple levels to show additional corresponding relationships that support any given sector or the whole industry (complex, aggregate, and/or all services). This specific map has been created to show what makes up the tourism industry from the viewpoint of what for consumer experience and what is actually marketed and sold. It is important to understand that the industry focuses on a whole where each of the categories is lexically and vitally and vitally... if it makes Oregon a destination point rather than a stop-over point.



Clackamas Co. and Mt. Hood Area

TOTAL DIRECT TRAVEL SPENDING BY CALENDAR YEAR, CLACKAMAS COUNTY AND MOUNT HOOD/COLUMBIA RIVER GORGE REGION

	2006	2008	2009	2010	% change 2005-2009	% change 2009-2010
Oregon	8072	8602	8075	8706	0%	+ 7.8%
Mt Hood/Gorge Region	274.8	287.0	261.5	278.0	-4.8%	+6.3%
Clackamas County	397.2	429.1	378.5	410.8	-4.7%	+ 8.5%

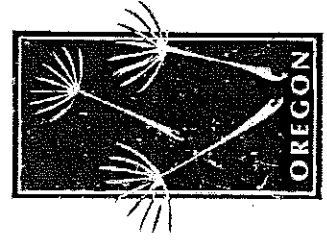
Source: Oregon Travel Impacts, 1991-2010a, Dean Runyon Associates for Travel Oregon;

** Visitor spending counted in millions of dollars

TOP FIVE URBAN ZIP CODES FOR MT HOOD/GORGE REGION, 2008-09 AVERAGE

City	% of regional visitors from specific urban areas
Portland, OR	32%
Seattle-Tacoma, WA	13%
Los Angeles, CA	7%
Eugene, OR	4%
San Francisco/San Jose, CA	4%
Boise, ID	4%
Spokane WA/ID	4%
Salt Lake City, UT	4%
Yakima, WA	4%
Yakima, WA	5%

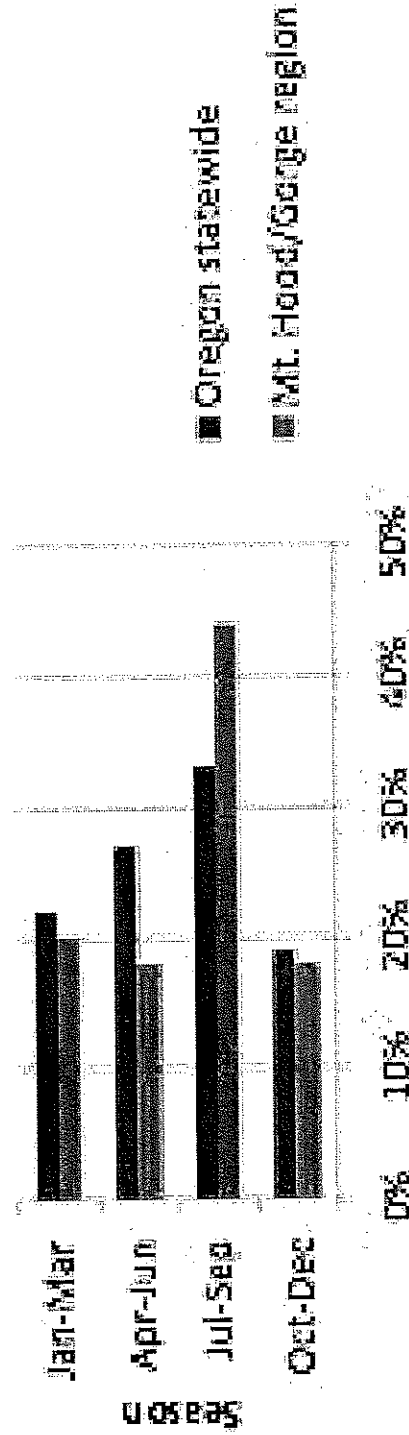
Source: Longwoods International for Travel Oregon



RURAL TOURISM STUDIO

Clackamas Co. and Mt. Hood Area

VISITORS BY SEASON: % DISTRIBUTION FOR MOUNT HOOD/ GORGE REGION AND STATE OF OREGON

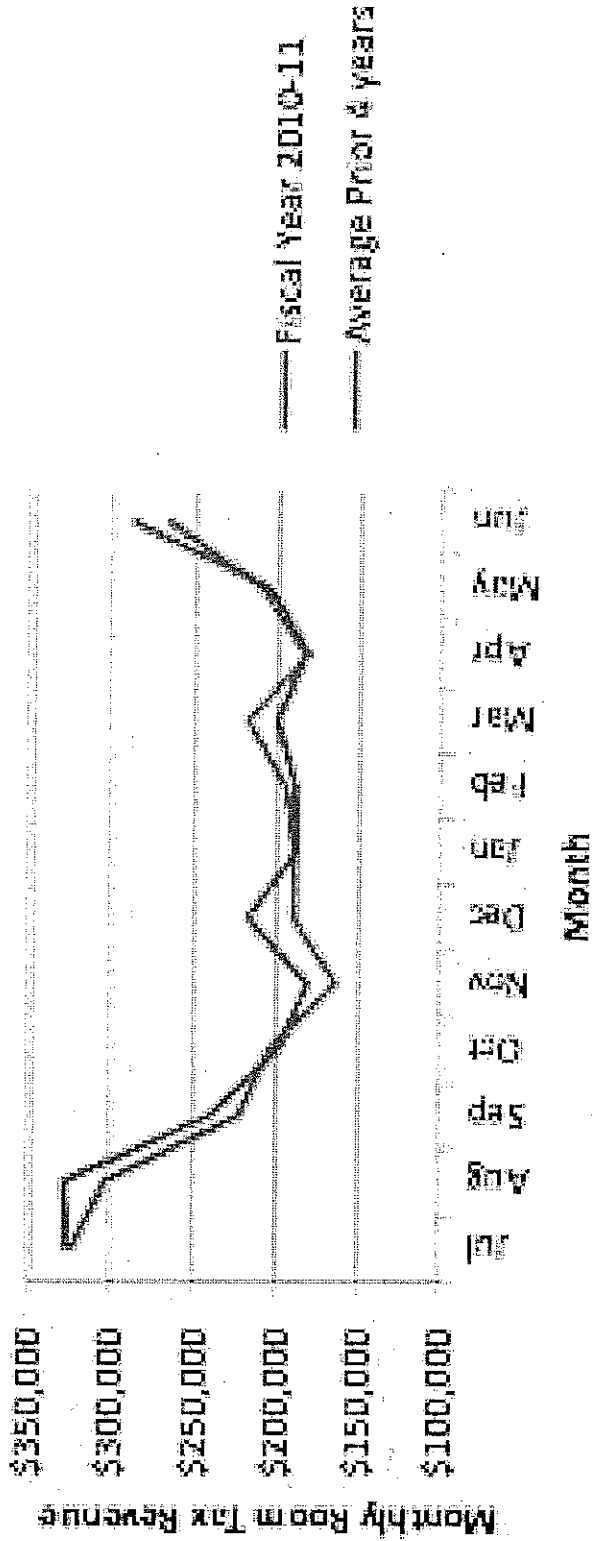


Percent of total annual visitors during this season

Source: Oregon 2009 Regional Visitor Research, Longwoods International for Travel Oregon

Clackamas Co. and Mt. Hood Area

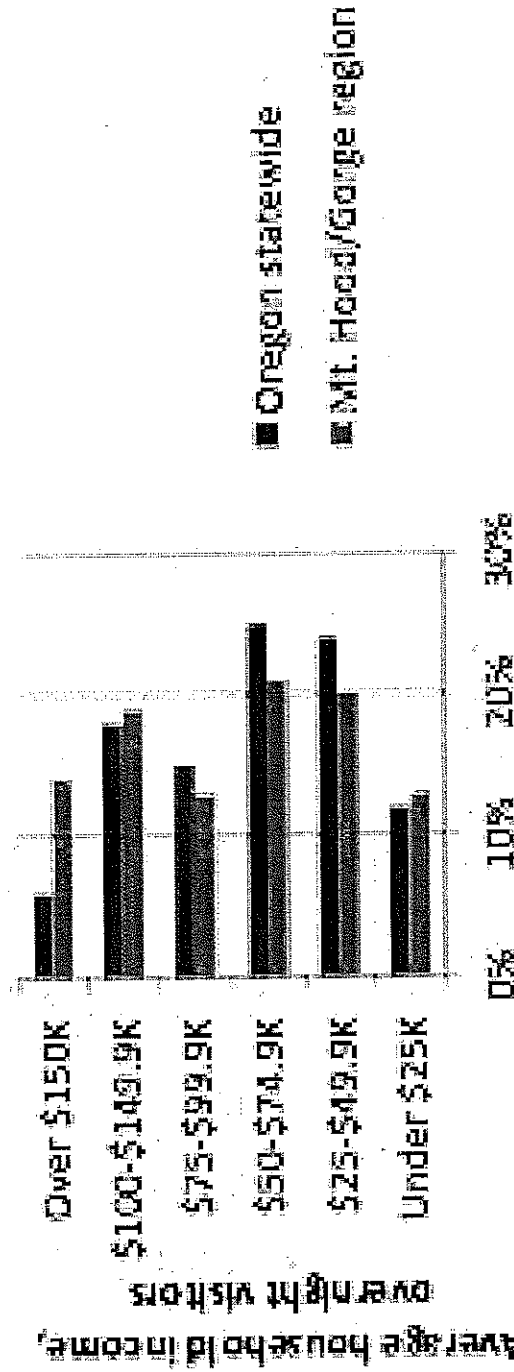
TRENDS IN CLACKAMAS COUNTY TRANSIENT ROOM TAX REVENUE FY2011 VS. PRIOR 4 YEAR AVERAGE



Source: Clackamas County Tourism and Cultural Affairs

Clackamas Co. and Mt. Hood Area

INCOME DISTRIBUTION OF OVERNIGHT VISITORS, 2008-2009 AVERAGE

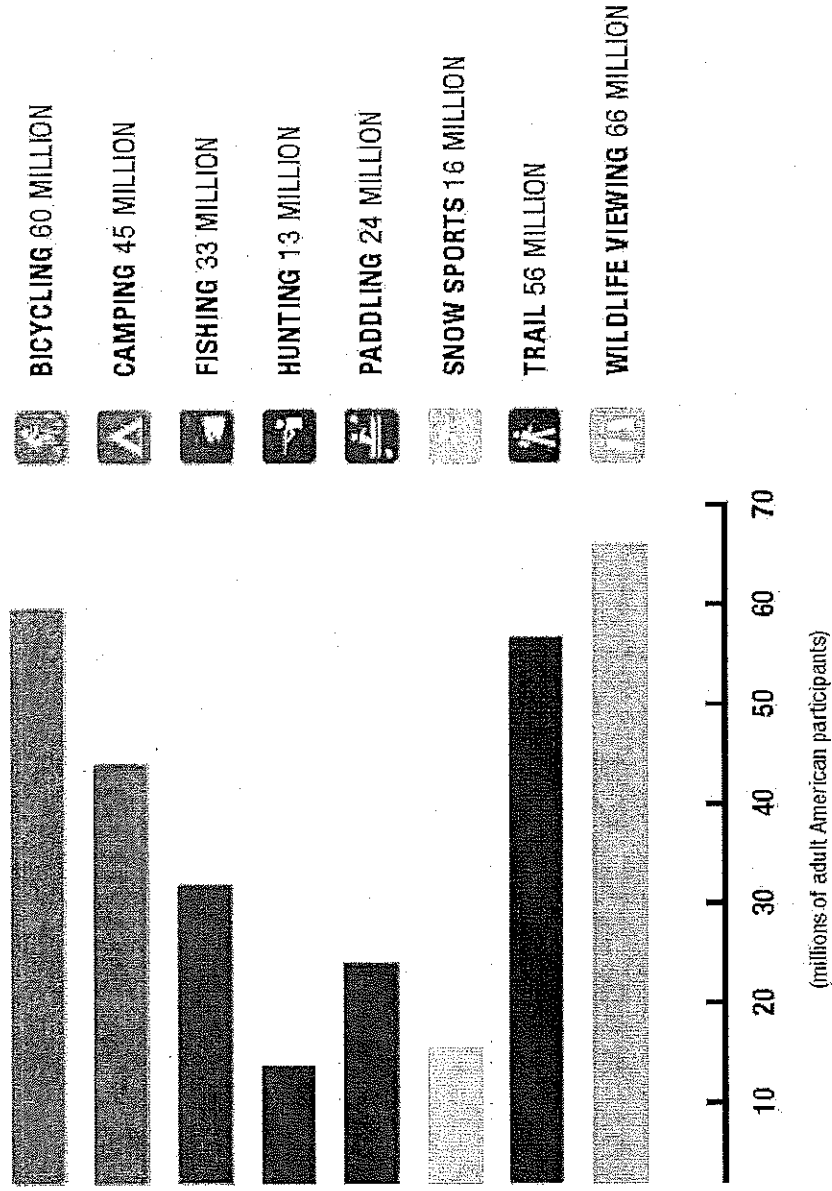


% of total overnight visitors in this income group

Source: Longwoods International

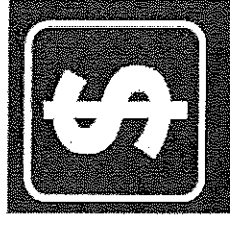
Active Outdoor Rec Participation

ACTIVE OUTDOOR RECREATION PARTICIPANTS BY THE NUMBERS



American Cycling Tourist

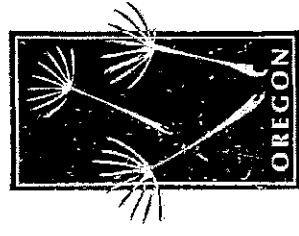
- 52% are 35-54
- 60% female
- Very affluent;
 - 78% annual income >\$60,000
 - 42% annual household income >\$100,000
- 70% are married
- Take 2.4 domestic trips per year



How does this translate in Oregon?

Those people spent over **\$223 million**, primarily on lodging, meals, and retail

Overnight cycling visitors
spent **8 times more** than
day travelers

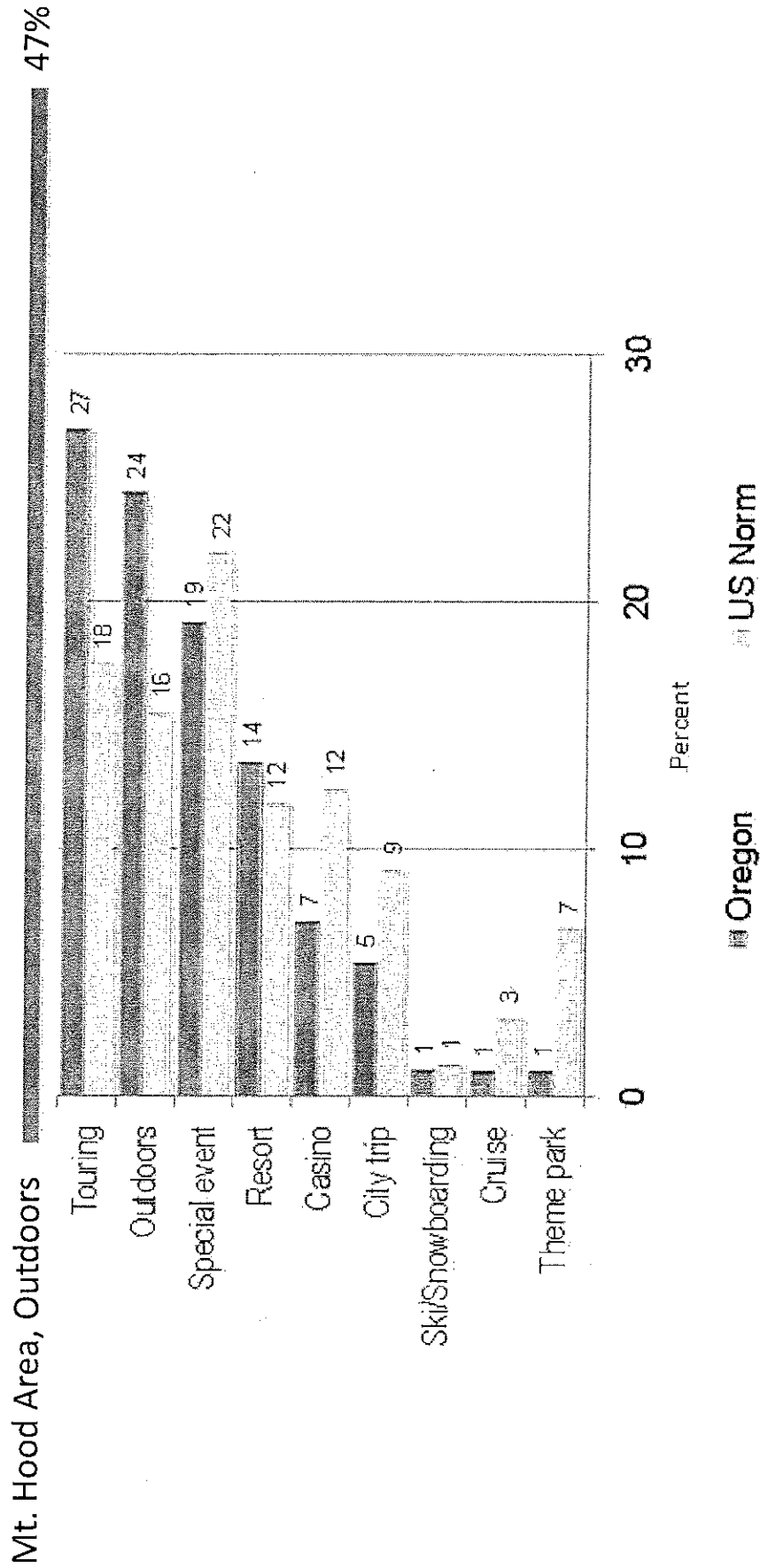


RURAL TOURISM STUDIO

Main Purpose of Marketable Trip – Oregon vs. National Norm



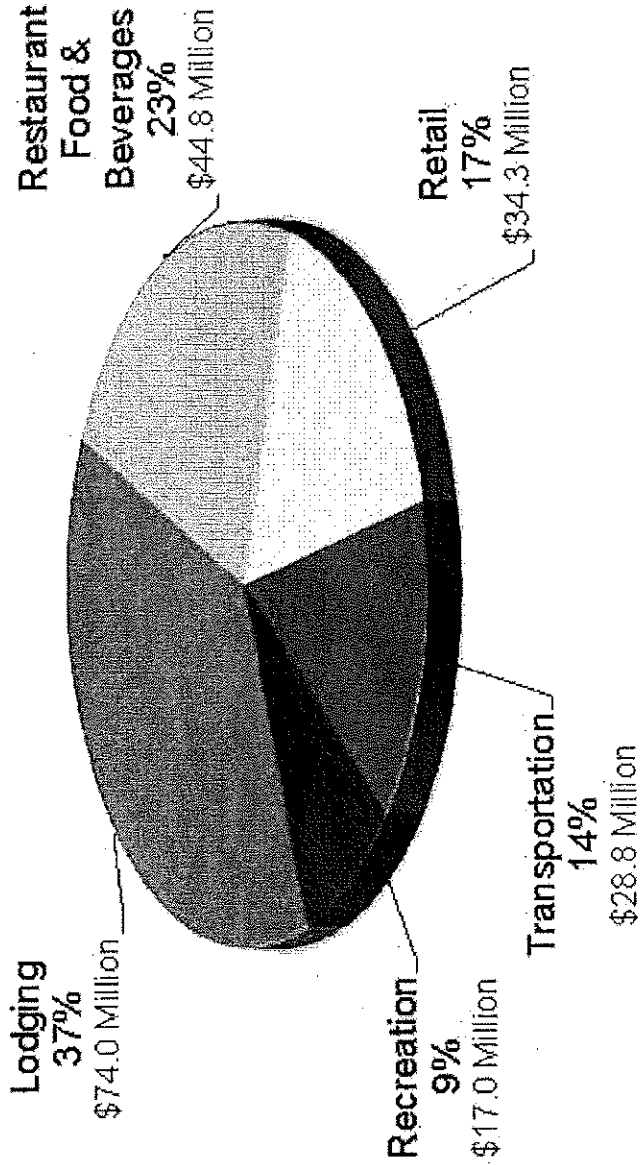
Base: Overnight Marketable Trips



Total Overnight Spending — by Sector

Base: Overnight visitors to Oregon reporting Biking as an activity

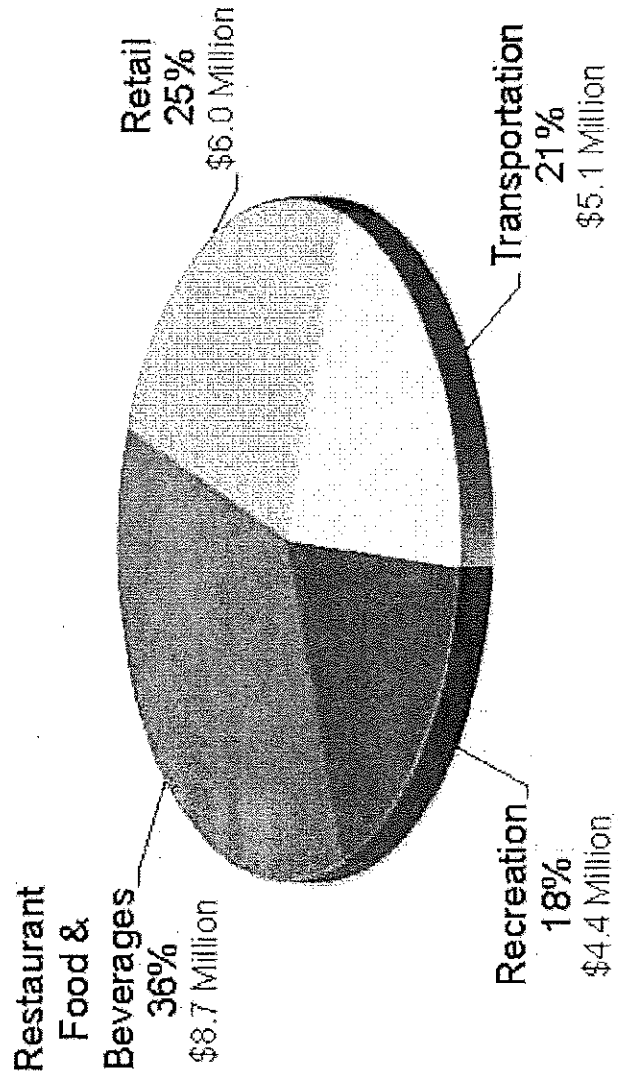
Total Overnight Spending = \$198.9 Million



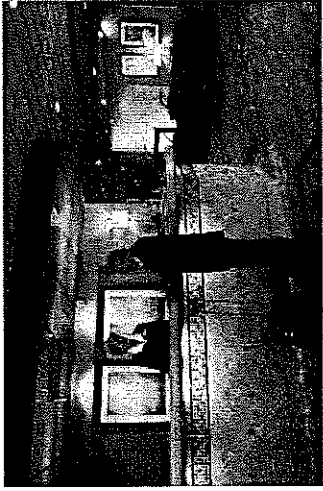
Total Day Spending – by Sector

Base: Day visitors to Oregon reporting Biking as an activity

Total Day Spending* = \$24.2 Million

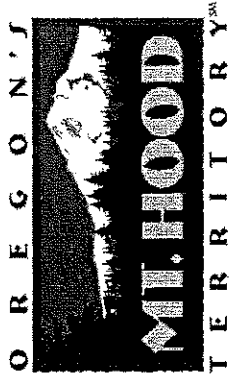


* Total Day Spending estimates are based on National Day Per Person Expenditures for 2008/2009 combined.



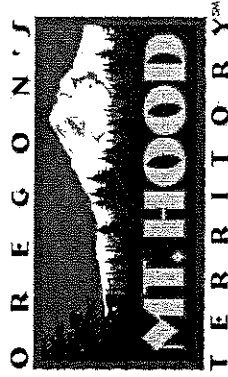
TOURISM DEFINITION

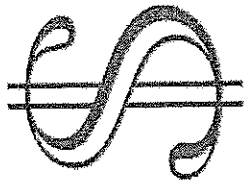
- *Tourism: Economic activity resulting from visitors to a destination.*
- *Visitor: A person who travels away from home for business, pleasure, recreation, or participation in an event more than 50 miles away, and/or includes an overnight stay.*



RESOURCE INVESTMENT PILLARS

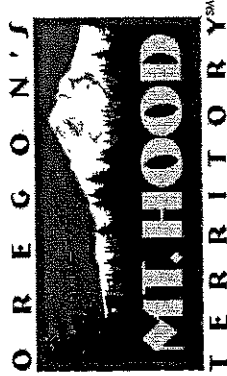
- **Outdoor Recreation:**
 - Snow/winter play or sports
 - Trails-i.e. Biking Tourism
 - Water/River Recreation
- **Agri-Tourism:**
 - Fresh/Organic, Farm to Table
 - Wineries, Gardens, etc.
 - Farm Stays
 - Equestrian
- **Geo-tourism:**
 - Culture, heritage and the arts



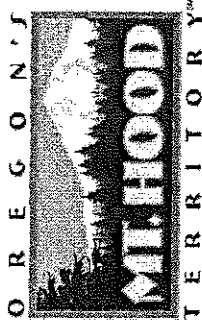


VALUE OF TOURISM

- Each \$1 TRT Spent Results in:
 - \$169 in Direct Visitor Spending (Up 8%)
 - \$411,000,000 Visitor Spending
- 60,000+ Visitor Inquiries
- 127, 812 Visitors to Tourism Website
- Partners received \$350,000 in cash assistance for local Tourism priorities

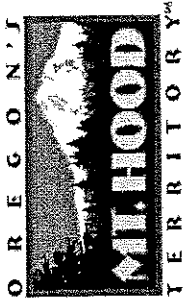


Tourism Partnerships




- Travel Oregon
- Travel Portland
- Regional tourism associations
- Local city and governments
- Chambers of Commerce
- Private tourism-related businesses

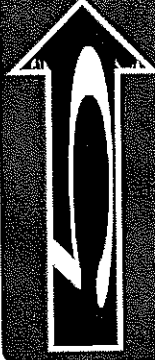
Items Accomplished or Almost:



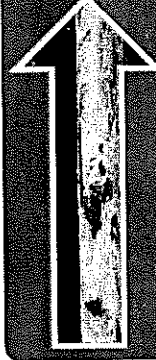
Department restructure; Recruitments;
Office move




Website redesign



Agri-tourism Master Planning

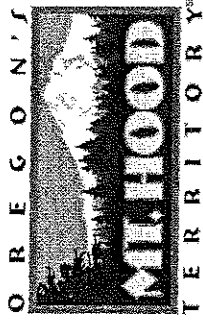


Getting Away Together PBS Program



Community Partnership Program

Items Currently Underway:



Willamette Falls Heritage Area Effort

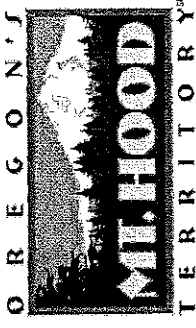
Execution of Scenic Byways Grant

**Best Practices Scan/Research and Data
Review to Inform 5-yr Business Plan**


Hood Multimodal Transportation Plan

Five-Year Business Plan Development

Items Currently Underway Cont:



 ITB Convention/International Marketing

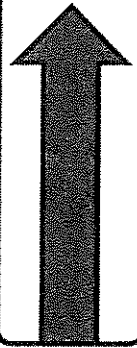
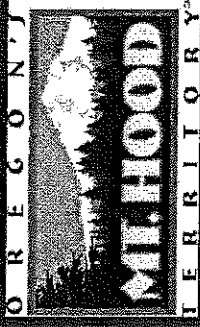
 Travel Package Development

 County Events Center Audit/Master Plan

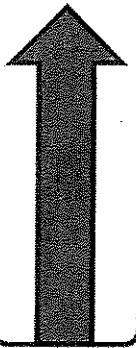
 Expansion of MVIC Use Outside of County

 New Five-Year Ad Agency Contract/RFP

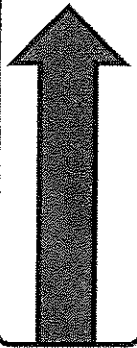
Items Pending:



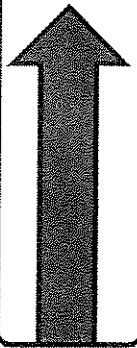
E-Concierge/ Visitor Portals



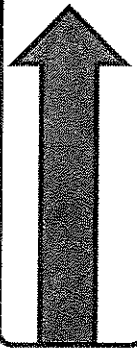
Development Grant Program



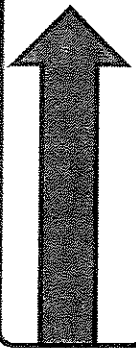
Co-Op Advertising Revision



2012-13 Business Plan

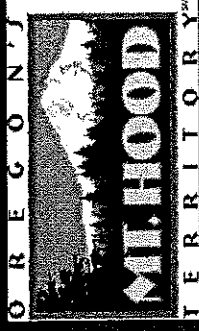


2012 -13 Department Budget

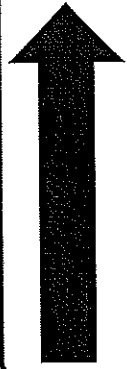


Visitor Information Centers

Unplanned Opportunities



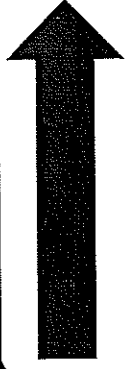
Bicycle Tourism Studios



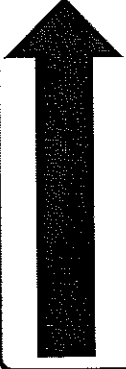
Arch Bridge Reopening Event



Mobile Website



Government Camp Rest Area



County Ag-Investment Strategy

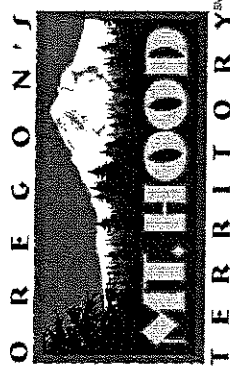


Zone Collection Data Study

2012-13 BUSINESS PLAN

Key Focus Areas/Priorities

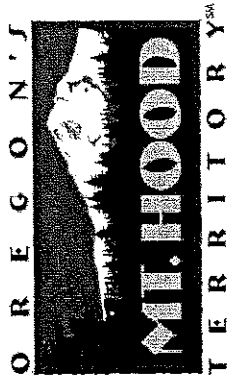
- Master Plan/BTS Implementation Strategies
- Conduct Heritage Master Plan
- Arch Bridge Reopening Event
- Visitor Information Services
- Scenic Byways Grant Implementation
- Development Grant Program
- Tourism “Tool Kit & Partner Education/Training
- Resource Development
- Marketing



RESOURCE INVESTMENT AREA

Marketing

- Advertising/Promotions
- Website Redesign
- Social Media
- Regional Marketing
- International Marketing
- Travel Media Relations
- Outdoor Recreation



RESOURCE INVESTMENT AREA

Market/Product Development

Product Development Plan

- Outdoor Recreation, Agri-Tourism, Heritage

Identify New/Expanded Market Opportunities

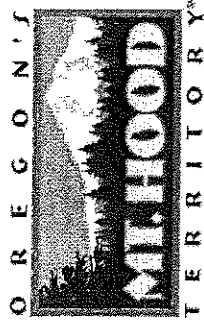
- Group Tours, International

Package/Itinerary development

- Lodging, Attractions, Transportation, Experiences, Dining, Shopping

Resource Development

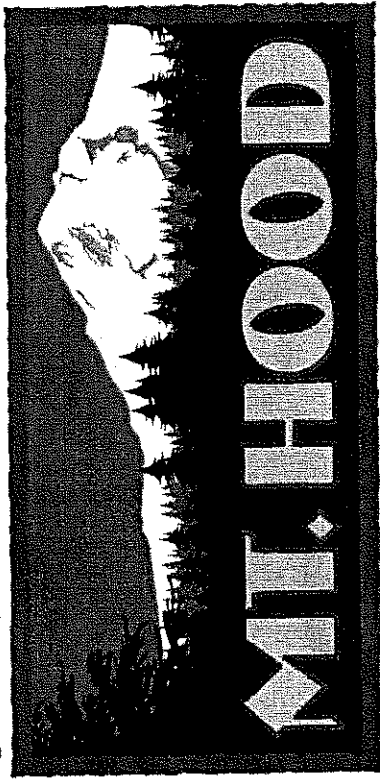
- E-concierge



Questions?

Thank You

O R E G O N ' S



T E R R I T O R Y SM

CLOSE TO PORTLAND...A WORLD AWAY SM

